

FINANCE & FACILITIES COMMITTEE | 3.21.2019



Tuition Recommendation Committee Update

Erin Foley | Vice President of Student Affairs

Brian Fox | Vice President Finance & Administration

TRC Charter



The Tuition Recommendation Committee is responsible for recommending the tuition and mandatory fee rates to the President who must in turn report and recommend mandatory tuition and fee to the Board of Trustees in accordance with ORS 352.102. The Board of Trustees shall request that the President transmit to the Board the joint tuition recommendation of the President and the recognized student government.

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Before making any recommendation to increase tuition and mandatory fees but especially when the proposed increase is more than five percent annually, the Committee must document its consideration of the impact on students, and the necessity of the increase in achieving the mission of the University. The Committee shall provide meaningful opportunities for members of the student government and students at large to participate in the process and deliberations.

TRC Principles



Guiding Principles

- Consider long-term factors when recommending the single year decisions (important to have a forward looking vision)
- Recognize the importance of affordability for students
- Tuition levels should be developed using data and information, including internal budget, comparator institutions, and external cost indices.
- Ensure we maintain the current service level, quality and support that Oregon Tech provides to students.

Process Framework

- Communicate openly and transparently with all stakeholders
- The committee will utilize data and information throughout the process
- Communicate respectfully and ask questions

TRC Membership



Brian Fox, Chair	Vice President for Finance and Administration	Klamath Falls
Richard Bailey	Department of Business Management, ETM	Klamath Falls
Erin Foley	Vice President for Student Affairs and Dean of Students	Klamath Falls
Erik Johnson	Director of Admissions	Klamath Falls
Taylor Kimura	Student Representative	Klamath Falls
Gary Kuleck	Provost and Vice President for Academic Affairs	Klamath Falls
Faith Lee	Student Representative	Klamath Falls
Anne Malinowski	Assistant Registrar	Portland-Metro
Kathryn (Katie) Mura	Student Representative	Klamath Falls
Johnathan Nguyen	ASOIT President	Portland-Metro
Rosanna Overholser	Department of Mathematics, HAS	Klamath Falls
Junmin Yee	ASOIT President	Klamath Falls
Osvaldo Capistran-Perez	ASOIT Vice President	Portland-Metro
Ernesto Hernandez	Student Representative	Klamath Falls

TRC Schedule Update



Nov 27	TRC First Meeting & Work Plan
Jan 11	Establish Committee Principles & Legislative Context
Jan 25	Institutional Budget Data & Tuition Comparisons
Feb 8	Preliminary Tuition Scenarios & Forecasting Tool
Feb 22	Student Forum Prep
Feb 25/27	TRC Open Forums Hosted by ASOIT
Mar 8	Forum Recap & Draft Tuition Recommendation
Mar 21	Board of Trustees Update
Apr 9	Student Forum Prep – Finalize Initial Recommendation
Apr 18/22	TRC Open Forums Hosted by ASOIT
Apr 23	TRC Final Recommendation

Legislative Requirements (HB 4141)



- Process includes university stakeholders
- Establish document outlining advisory body's role
- Training on; university budgets, the legislative appropriations/agency funding process and historical tuition and fee data
- Information on managing costs and tuition changes if the state provided additional resources
- If tuition increase are over five percent, document the impact on historically underserved populations and the mission of the university
- Provide meaningful opportunities for student involvement
- Provide a written report to the president outlining deliberations
- Create a website with committee meeting information

HECC Evaluation



The HECC has established a series of review criteria for tuition increases above the 5% review threshold, these include;

1. Fostering an inclusive and transparent tuition setting process
2. Safeguarding access and support for degree completion by historically underrepresented students
3. Financial conditions demonstrating the need for resident undergraduate tuition to be increased more than 5%

State Funding Context



- Co-Chairs Budget:

- PUSF +\$40.5M
- OREC Under Review [currently \$255K/year]
- ETSF Under Review [currently \$1.22M/year]
- Sports Lottery Under Review [currently \$459K/year]

- Gaps to close:

- Co-Chairs Budget = -\$4.9M OT budget gap for FY 20
- If OREC, ETSF, Sports Lottery \$0 funded = -\$6.8M OT budget gap for FY 20

- Tuition and budget setting assume non-PUSF funding approved at current levels

TRC Discussion Ranges



	Scenario I	Scenario II	Scenario III
Tuition	+7%	+9%	+15%
Remissions	+\$355K	+\$355K	+\$670K
Budget Cuts	-\$1.6M	-\$1.0M	-\$100K
Biennia change in F/B	-\$1.2M/+\$1.2M	-\$1.4M/+\$1.4M	-\$1.7M/+\$1.7M
Impacts:	<ul style="list-style-type: none"> - Moderate tuition increase - Fund targeted remission increase - Significant ongoing budget reductions in current fiscal year, impacting academic quality 	<ul style="list-style-type: none"> - Middle path tuition increase - Fund targeted remission increases - Moderate budget reductions/savings - Balanced across biennia 	<ul style="list-style-type: none"> - High tuition increases, may impact enrollment - Funding of significant targeted remissions program - Limited budget reduction to support ongoing growth

May F&F Committee Plan



- Presidential & TRC Tuition Recommendation
- Summary of TRC Process & Joint Presentation with ASOIT, including;
 - Transparency and student input
 - Safeguards for access, completion and quality of education
 - Financial conditions and budget projections
- Comparator/Competitor University Tuition Report
- Remissions and Scholarship Plan with Impact on Underrepresented Students
- Medium Term Fund Balance Impact
- HB 4141 Compliance Report



Questions

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